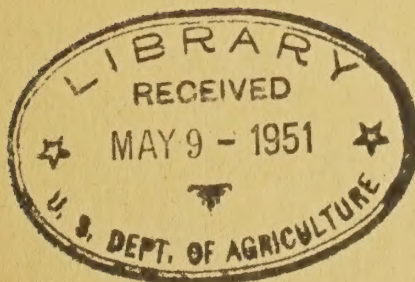PROJECT CONTROL SYSTEM
FOR
MANAGEMENT DIVISION,
Rural Electrification Administration

U. S. DEPARTMENT OF AGRICULTURE
Rural Electrification Administration.
Management Division.

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INDEX

PART A

ESTABLISHMENT OF A PROJECT CONTROL SYSTEM

I. Statement of Problem

The need has been established for developing a comprehensive
Project Control System, whereby we may get central control
over programs considered essential for the improvement of
operations in rendering advice and assistance to borrowers,
consistent with sound business management principles and
practices. At present, no planned pattern exists for develop-
ing a program, establishing a priority, or for delegating
action with adequate control. In addition, a system is needed
for readily determining progress phases of all projects, and
presenting an inventory of outstanding programs which are in
the developmental stage.

II. Purpose

The Project Control System will coordinate various inde-
pendent projects into a planned program. Present and con-
templated programs should be established and receive priority
based on need and facilities available together with delega-
tion of action with adequate control.

A control method is included. This will provide instantaneous
information as to the status of all projects in the various
stages and an inventory of all projects completed or awaiting
action. The system will also provide for immediate expediting
when difficulties are apparent.

With the clearance of a backlog of proposed projects into
action programs, ideas yet unsuggested will be encouraged
by the impartial evaluation and immediate action.

This system will implement the present programs, encourage
new programs, and expedite suggestions into accomplished
facts. Through implementation of the approved programs
the tools of management will be made available for the
Management Division staff and particularly for the field
personnel in advising and assisting borrowers in solving
overall management problems. It will help provide borrowers
with the necessary know-how for operating their businesses
consistent with sound management principles and practices.

III. Plan of Approach.

As a final step in resolving this problem, a study was
initiated to determine the best method and procedure for
establishing a Project Control System. The results indicate
that the best method of approach would be:

A. Establish a Project Control Committee to provide:

   1. A means for evaluating suggested ideas and determining
      necessary projects.

   2. A method for determining priority for projects.

   3. Delegation of specific projects to appropriate per-
      sonnel or offices for development.

   4. The schedule required to develop specific projects
      (or phases of projects).

   5. Overall appraisal of project upon completion.

B. Establish a Project Control Board to provide:

   1. A control method to study degree of completion of
      project, and rate of progress as compared to
      indicated plan of accomplishment.

   2. For follow-up to assure completion as planned.

   3. For expediting when project is behind schedule.

   4. An appraisal of actual results as compared to planned
      accomplishments.

   5. An inventory of all important existing approved projects.

IV. Procedure

A. The Project Control Committee

This committee is to be composed of the Assistant Chiefs, the
Regional Heads, and the Assistant to the Chief of Management
Division, and will include the various specialists when
projects affecting them are under discussion.

1. Initiating and channeling program requests.

   a. Anyone who recognizes the need for development of a program is encouraged and in fact expected to recommend its initiation.

   b. Staff officials charged with particular responsibilities are, of course, expected and required to develop programs to adequately carry out those responsibilities.

   c. Program requests should be made in writing and where possible contain:

      (1) An explanation of the proposed program.
      (2) The reasons why it should be undertaken.
      (3) Recommendations as to how it should be undertaken.
      (4) Benefits and results to be obtained by the project.
      (5) Any other information believed pertinent.

   d. Program requests should be submitted to the Chairman of the Committee.

2. Committee Action.

   a. The Committee will review the suggested idea and if it is deemed justifiable will recommend approval for establishing it as a project to be developed.

   b. Upon approval for development, a priority will be given based upon urgency of problem and availability of resources. The actual priority standards are to be decided by the Committee itself.

   c. The specific project will be delegated for development to the person or office deemed most appropriate by the Committee.

   d. A schedule of time required for each of the five phases and for completing the project will be determined, and the frequency of reporting will be stated therein. The phase breakdown for purposes of control are established as follows:

      (1) Objectives and Requirements.
      (2) Development.
      (3) Testing.
      (4) Execution.
      (5) Appraisal.

e. For further clarification persons initiating original request for program development should be consulted for additional information.

3. Project Development.

   a. After a project has been approved by the Committee and Division Chief, the project, with all data, will be forwarded to the Assistant to the Chief, who will:

      (1) Assign a project number.
      (2) Initiate a project control card. (CO-179) attached herewith.
      (3) Establish project into Project Control System. (Refer to attached photograph of Control Board)

   b. The Assistant to the Chief will then:

      (1) Consult with the Division Chief and the person or office assigned to develop the project to establish unanimity of purpose, plan of approach, desired results, and generally coordinate the various efforts.

      (2) Follow-up to assure that project is being developed, and to expedite progress as necessary.

      (3) Periodically advise the committee and Division Chief of the status of all projects and of the ones not yet assigned for development.

      (4) Upon completion of a particular project, prepare and submit to the Committee a summary of the program and its effect on the Organization of the Division.

4. Program Implementation.

   a. The Committee will review the summary and related material to determine:

      (1) Whether the objectives (with respect to the program's development) have been accomplished satisfactorily.

(2) The plan required to accomplish implementation and usage.

(3) The necessary action to check results after a period of usage to determine adequacy and possible improvement.

(4) Whether a project in the development stage should be continued if the need no longer exists for such a program.

b. Upon completion of review, the Committee will advise the Assistant to Chief and others concerned, of the course of action to be followed. The Assistant to Chief will take necessary action to accomplish desired results.

PART B

DETAILS OF THE PROJECT CONTROL BOARD

The Control Board will be composed of three sections: A record
file, an indicator, and a summary. (Refer to attached photograph)

I. The Record Section

   A. The Project Control Record File (Exhibit A on photograph)

   This is a Produc-trol visible card file, 5 x 8 card size,
   100 card capacity. This will contain the Project Card and
   will show the title of project, the reporting frequency,
   and the number assigned to that particular project. In
   addition, the following color-tabs will be placed near the
   right corner to provide immediate identification of the
   frequency of reporting.

            Red   - Reports weekly
            Yellow - Reports semi-monthly
            Green   - Reports monthly

   B. The Project Control Form Card (CO-179)

   The attached form is a sample of the record card.

   The front side of the card contains the following informa-
   tion:

            Person or office assigned to develop the project.
            Date of initiation and time schedule of project. (This
                includes the time schedule for each of the five phases)
            Signature and approval of Chief of Division.
            Report of Progress. (Reporting date and comments
                on progress of the project)

   The back of the card contains a short statement defining
   the objectives of the project, and a section for comments
   of the committee and the approving officer. Also included
   is a final statement of the project. This is a summary
   of the appraisal of the final accomplishments when compared
   to the objectives. These together will present a concise
   summary of the projects from initiation to completion, and
   the results obtained.

II. Progress Indicator Section. (Exhibit B of photograph)

A. This utilizes a "Produc-trol" Board. Essentially, it is
a peg-board having evenly punched holes so calibrated in
relation to a heading strip that years, months, and
workdays by actual date can be identified by inserting
pegs in vertical columns of peg-holes. Horizontally
extended white cords fastened to numbered pegs - one for
each project in the visible file to left - indicate the
percentage of progress of each individual phase and the
progress of the project. A movable vertical yellow cord
indicates a common calendar-line with reference to the
heading strip.

B. Legend.

Color and shape of indicator pegs show phases and operations
of project development, the legend for which is as follows:

White square peg - Project initiated.
Orange square peg - Completion date of objectives
    and requirements phase.
Pink square peg - Completion date of development phase.
Blue square peg - Completion date of testing phase.
Green square peg - Completion date of execution phase.
Green and white triangle peg - Completion date of
    Appraisal phase and termination of the project.
Yellow oblong peg - expediting action taken.

III. The Project Status Summary Section. (Exhibit C of Photograph)

A. This section is designed to provide a rapid summary of the
status of each project. It is a condensed version of the
Progress Indicator Section, and composed of five vertical
columns of five peg-holes each. Columns are separated by
white vertical spacing cords and captioned from left to
right as follows:

1. Objectives and Requirements.
2. Development.
3. Testing.
4. Execution.
5. Appraisal.

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B. Legend

Color and shape of indicator pegs are identical to those
stated above, with the following exceptions:

White square peg - Project proceeding satisfactorily
Red square peg - Project not proceeding as scheduled
Yellow round peg - Expediting actions taken

IV. Operation of Progress Control Board

A. Schedule Section

1. A yellow date line is imposed vertically on the board,
   so that it indicates the actual date as shown by the
   heading strip. The pegs of the vertical date line
   are inserted in the extreme top and bottom rows of
   peg holes located outside the peg hole section proper.
   This day line is moved one peg hole to the right at
   the beginning of each work day.

2. When a project is initiated a white square peg is
   inserted in the upper row of the double row of peg
   holes assigned to the project, the flow line is
   extended and its peg inserted immediately below the
   white peg. In order that the time lapse between the
   initiation of the project and its scheduled completion
   may be indicated, this white peg is not removed from
   the board until the completion of the project.

3. When the schedule of the phases of the project has been
   completed it is posted on the board by inserting the
   proper pegs (see legend) in the upper row of peg holes
   assigned to the project under the date that each phase
   is to be completed. The flow line is extended and
   pegged-in under the peg signaling the scheduled
   completion date of Phase No. 1. When the project moves
   into Phase 2, the peg signaling the completion date
   of Phase 1 is removed and the flow line is moved to
   the right and pegged-in under the peg signaling the
   completion date of Phase 2. This process is repeated
   until the project is completed at which time all pegs
   relating to the project are removed and the flow line
   retracted fully.

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4. Those flow lines which are to the right of the vertical day line signal projects which are progressing satisfactorily or are actually ahead of schedule.

5. When a signal peg appears directly under the day line, the phase signaled by the peg should be completed by the end of the current work day.

6. Those flow lines which are to the left of the day line signal the projects which are behind schedule and the intervening space is an indication of the length of time the delinquency has existed.

7. When expediting action has been taken for the purpose of bringing a delinquent project back on schedule a yellow oblong shoulder peg is placed to the right of and adjacent to the flow line peg of the delinquent project.

B. Project Status Summary.

1. When a project enters a phase, a green and white triangle peg is inserted in the center of the column captioned for that phase and in the upper row of peg holes assigned to the project.

2. If the project falls behind schedule the green and white peg is removed and replaced by a red signal peg. When expediting action has been taken a yellow signal peg is inserted adjacent to and below the red signal peg. When a project completes a phase the signal peg (or pegs) is removed.